

**THE NATIONAL ARCHIVES**

**MIXED COLLECTIONS GUIDANCE**

**INVITATION TO TENDER – OPEN COMPETITION**

**DEADLINE FOR TENDER SUBMISSIONS – 5PM (UK TIME), 6 NOVEMBER 2020**

**1 ABOUT US**

- 1.1 The National Archives is the official archive and publisher for the UK government, and for England and Wales. We are the guardians of some of our most iconic national documents, dating back over 1,000 years. We are an accredited archive service.
- 1.2 Our 21st-century role is to collect and secure the future of the government record, both digital and physical, to preserve it for generations to come, and to make it as accessible and available as possible.
- 1.3 The National Archives' business plan, [Archives For Everyone](#), commits us to lead the archives sector to fulfil the vision set out in the strategic vision for archives, [Archives Unlocked](#), promoting our shared values of trust, enrichment and openness. It also sets out our aim to lead the world in reimagining archival practice for the 21st century, pioneering new and ethical approaches to appraisal and selection, description, digital preservation and access.

## **2 PURPOSE**

- 2.1 This invitation to tender specifies our requirements for provision of the following services:
  - 2.1.1 guidance on Mixed Collections;
  - 2.1.2 a refreshed version of AIM's (the [Association of Independent Museums](#)) Successfully Managing Archives in Museum; and
  - 2.1.3 the provision of a promotional event.
- 2.2 The maximum available budget for this contract is £20,000, excluding VAT but including all travel and other expenses, including for the event.

### 3 REQUIREMENTS, OBJECTIVES AND DELIVERABLES

- 3.1 Most archives have mixed collections to a certain degree, including a range of non-archival objects that cannot practically (or ethically) be separated from the main collections. However, certain parts of the sector, particularly charity and business archives, and Special Collections within Higher Education institutions, may be called upon to care for a greater proportion of non-archival items. Such material might include works of art, objects, costume and textiles, natural history specimens, architectural models, set designs and even human tissue samples, as well as non-traditional media with content unfamiliar to most archivists, such as CAD files or MRI scans. The creation of the Archives and Records Association's Section for Archives and Museums in 2019 provides further evidence for the demand for guidance of this kind.
- 3.2 The Mixed Collections guidance to be produced under this contract would look at issues such as (but not limited to):
- Key principles
  - Whether they are the appropriate custodians of such collections (with accessioning and de-accessioning advice)
  - Storage
  - Reconciling different environmental requirements
  - Standards
  - Cataloguing
  - Access and Interpretation
  - Sources of advice on conservation and preservation
  - Liaison with the museums sector
  - Legal aspects
  - A range of appropriate case studies from or directly relevant to the archive sector.
- 3.3 The Mixed Collections guidance will be aimed at all types of archive service holding mixed collections. The guidance will be designed to support archivists and their managers to make informed decisions about managing, developing and promoting access to their collections.
- 3.4 As a smaller work package within the project, you will conduct a light-touch refresh of the [Successfully Managing Archives in Museums guidance](#). Led by TNA in conjunction with AIM, the refresh will include updated links, standards and case studies, and reference to recent legislation and developments in digital preservation, would form a smaller work package within the project.
- 3.5 We would like to deliver an event to showcase the two reports, delivered to representatives of the archives, museums and HE library sectors. This may take the form of a physical event (in the UK), or a hosted webinar, depending on timing, and the then current situation with regard to the Covid-19 pandemic. You will be required to appear at this event to introduce and explain the guidance.
- 3.6 Project deliverables are:

- 3.6.1 The Mixed Collections guidance, in the form of a handbook or similar set of practical notes which can be used both online and in printed format. All material should be tailored specifically to the Archive sector and include case studies.
- 3.6.2 The refreshed version of Successfully Managing Archives in Museums, which should take into account and provide:
- reference to the Data Protection Act 2018 and the GDPR regulations
  - refreshed links to online resources
  - updated links to standards
  - updated case studies, or appropriate replacements
  - updated guidance on digital records.
- 3.6.3 Your attendance at an event (format/location to be determined) to showcase the two reports. Your contract price must include travel and accommodation for this event.
- 3.7 The anticipated work plan is as follows:
- Project initiation
  - Evaluation of current guidance
  - Draft updated/new guidance
  - Guidance sign-off
  - Event

## 4 HOW TO RESPOND

- 4.1 If you have any clarification questions related to your Tender Response, please submit these to [procurement@nationalarchives.gov.uk](mailto:procurement@nationalarchives.gov.uk) by **5pm (UK time) on 22 October 2020**.
- 4.2 Please submit your Tender Response to [procurement@nationalarchives.gov.uk](mailto:procurement@nationalarchives.gov.uk) by **5pm (UK time) on 6 November 2020**.
- 4.3 It is for you to determine what format your Tender Response should take so as to describe your offer in a clear, comprehensive fashion. However please ensure your Tender Response includes as a minimum:
  - 4.3.1 Your **understanding** of the project and deliverables;
  - 4.3.2 Details of your prior **experience** suited to this project, including understanding of sector-related guidance and standards;
  - 4.3.3 Your proposed **methodology and timetable** for delivery of the project outcomes;
  - 4.3.4 Names and experience of the **individuals** you will assign to the project, and their involvement with each phase of unit of the work;
  - 4.3.5 Your **contract price**, including breakdown of costs for each phase or unit of work, day rate for each team member and other costs or expenses.

## 5 EVALUATION CRITERIA

5.1 Your Tender Response will be evaluated using the following criteria:

Category	Maximum pre-weighted score	Weighting	Maximum weighted score
1. Extent to which proposal demonstrates an understanding of the brief	10	2	20
2. Knowledge and experience relevant to the project, including understanding of the specific needs of the archive sector	10	2.5	25
3. Quality of methodology and experience in relation to desk-based research and stakeholder engagement	10	2.5	25
4. Names and experience of individuals assigned to the project, and their involvement with the development of training materials and training delivery.	10	1	10
5. Contract price	10	2	20

5.2 Price scores will be based on a comparison between each Supplier's price offer, based on the percentage difference from the lowest bid price. The lowest offered price will receive the maximum pre-weighted score of 10 points, a price which is 20% higher will receive a score of 8 (ie the maximum score minus 20%).

5.3 Other categories will be evaluated according to the table below:

<b>10 Points</b>	<p><b>Outstanding:</b></p> <ul style="list-style-type: none"> <li>• Potential Supplier has provided a response that addresses all parts of the requirement</li> <li>• Potential Supplier has provided evidence to support all elements of their response</li> <li>• The evidence supplied is convincing and highly relevant to the requirement</li> <li>• Potential Supplier's response is clear and easy to understand</li> <li>• Where relevant, Potential Supplier has demonstrated a high level of capability to deliver new and innovative service approaches</li> </ul>
<b>7 Points</b>	<p><b>Good:</b></p> <ul style="list-style-type: none"> <li>• Potential Supplier has provided a response that addresses all parts of the requirement</li> <li>• Potential Supplier has provided evidence to support most elements of their response</li> </ul>

	<ul style="list-style-type: none"> <li>• The evidence supplied is good and relevant to the requirement</li> <li>• Potential Supplier's response is clear and easy to understand</li> <li>• Where relevant, Potential Supplier has demonstrated some level of capability to deliver new and innovative service approaches</li> </ul>
<p style="text-align: center;"><b>4 Points</b></p>	<p><b>Average:</b></p> <ul style="list-style-type: none"> <li>• Potential Supplier has provided a response that addresses some parts of the requirement</li> <li>• Potential Supplier has provided evidence to support some elements of their response, but not all</li> <li>• The evidence supplied has some limited relevance to the requirement</li> <li>• Potential Supplier's response is not always clear and easy to understand</li> <li>• Where relevant, Potential Supplier has demonstrated limited capability to deliver new and innovative service approaches</li> </ul>
<p style="text-align: center;"><b>1 Point</b></p>	<p><b>Poor:</b></p> <ul style="list-style-type: none"> <li>• Potential Supplier has provided a response that fails to address most parts of the requirement</li> <li>• Potential Supplier has provided little or no evidence to support most elements of their response</li> <li>• The evidence supplied is very weak and has very limited relevance to the requirement</li> <li>• Potential Supplier's response is not always clear and easy to understand</li> <li>• Where relevant, Potential Supplier has demonstrated little or no capability to deliver new and innovative service approaches</li> </ul>

## 6 PROCUREMENT TIMETABLE

6.1 The procurement timetable is as follows:

Ref.	Description	Date
1	Invitation to Tender published	15 October 2020
2	Deadline for Potential Suppliers to submit clarification questions to <a href="mailto:procurement@nationalarchives.gov.uk">procurement@nationalarchives.gov.uk</a>	5pm 22 October 2020
3	Deadline for TNA to respond to clarification questions*	26 October 2020
4	Deadline for Potential Suppliers to submit Tender Responses to <a href="mailto:procurement@nationalarchives.gov.uk">procurement@nationalarchives.gov.uk</a>	5pm 6 November 2020
5	Interviews with shortlisted Potential Suppliers – <b>please keep this date free</b>	12 November 2020

\* Any clarification question received that TNA deems to be relevant to more than one Potential Supplier may be shared with all Potential Suppliers.

## **7 CONTRACT TERMS**

- 7.1 The contract will be awarded subject to our standard terms and conditions, which can be found [here](#).
- 7.2 TNA reserves the right not to award and to complete its objectives through other means.